CHILTON'S
AUTOMOTIVE INDUSTRIES
SINCE 1895

MAY 1987

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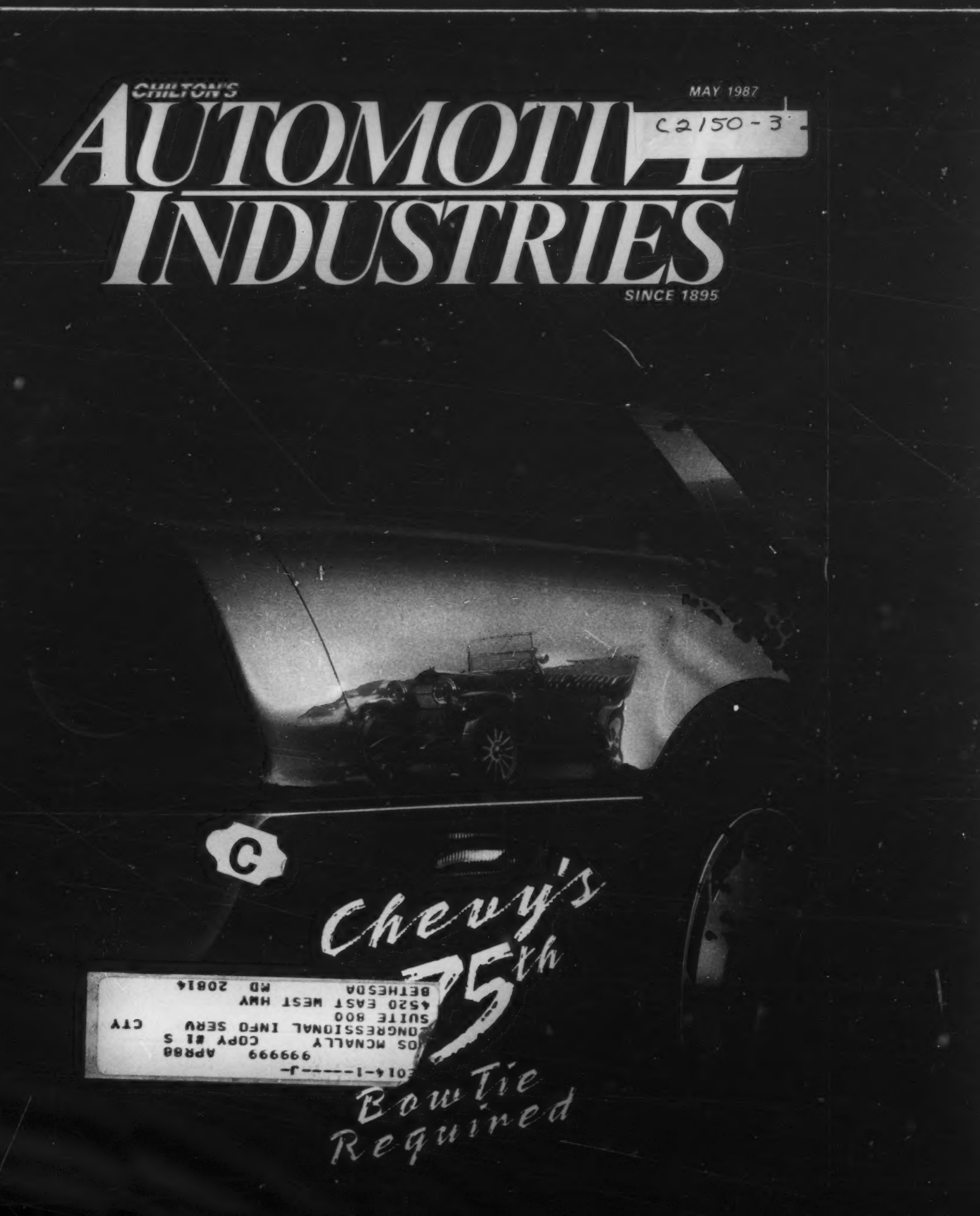

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AUTOMAKER QUARTERLY REPORT

First quarter '87 reveals the effects of cost-cutting at GM and a final hurrah for AMC as AMC. Meanwhile, Ford keeps reaching for the stars.

by Tom O'Grady

The remainder of 1987 will signal a turning point for much of the industry: Although the fall in the value of the dollar seems to be a burden to the imports and good news for the domestics, US sales will substantially drop and the domestic industry will restructure to some extent.

In response to heavy criticism GM is pushing for cuts in costs. Some of the GM plant closing costs were already written off in 1986, so expect a healthy 1987. The Corsica/Beretta will have a positive affect on GM's market share. GM's major move in the market will be the W-car, the mid-size replacement to be introduced next year.

Meanwhile, Ford is taking advantage of GM's delays in W-car production and pursuing the mid-size population with its successful Taurus/Sable. The company will continue to change as the Mazda plant at Flat Rock starts production and Ford imports cars from Mexico and Korea.

Thomas O'Grady heads Integrated Automotive Resources, Inc. in Wayne, Pennsylvania.

In 1987, Chrysler will be hampered in the short run by the acquisition of AMC, which will take impressive amounts of time and energy to assimilate. These problems will nonetheless cause some short-term observers to question the practicality of the acquisition. Yet the AMC products should bring more to Chrysler, particularly in the truck market.

Although it may seem inevitable that AMC was to disappear, it seems worthwhile to take note of its recent performance. AMC recently made solid progress in quality and new products (Premier and Medallion) and improved its bottom line.

Subaru continues to make progress and find ways to increase revenue while under the import restraints. And Honda will see both increases in production at Marysville and greater acceptance of the Acura. Honda's success has been based primarily on quality, and the emphasis on quality seems to leave Honda in continually short supply. AI

WHAT'S HOT! Domestic Auto Sales (1st Quarter Results)

Carline	'87	'86	% Change
Cavalier	95,210	100,079	(4.87%)
Celebrity	85,642	99,230	(13.69%)
Escort	84,561	91,843	(7.9%)
Taurus	78,635	36,580	114.69%
Ciera	62,584	82,441	(24.09%)
Accord*	72,227	70,164	2.94%
Tempo	60,821	65,462	(7.09%)
Sentra*	62,194	43,832	41.89%
Grand Am	50,691	46,697	8.56%
Mustang	49,974	39,352	26.9%

*—Includes imports
( )—Negative value

US Passenger Car Market Shares To Date

Manufacturer	Sales	% Total
General Motors	878,784	37.78%
Ford	464,744	19.98%
Chrysler	258,272	11.10%
Honda/Acura	160,080	6.88%
Nissan	143,445	6.17%
Toyota	108,411	4.66%
Subaru	34,943	1.50%
VW	32,716	1.41%
AMC/Renault	8809	0.38%

Continued

Passenger Car Market Share By Geographic Base

Manufacturers	Total Sales	Total Market Share
American	1,518,914	65.3%
Japanese	459,467	19.75%
European	198,293	8.52%
US Built Imports (VWUS, Honda, NUMMI, Nissan, Renault, Toyota	149,398	6.42%
Total	2,326,072	100.00%

Domestic Light Truck Quarterly Production

Truckline	3-'86	4-'86	1-'87
Chrysler Vans	19,651	32,313	33,871
. Sport Utility	6441	6830	7380
....Miniwagon	56,811	69,844	76,909
Lt Conventional	48,812	64,216	63,795
Ford Aerostar	41,142	41,153	51,405
..... Bronco	10,322	10,322	16,626
..... Econoline	45,957	58,079	62,014
..... Ranger	73,124	76,941	87,788
..... Bronco II	25,081	30,648	32,369
..... Light Conv.	146,735	98,750	178,156
Chevy .. Blazer	6352	7255	8825
.....Suburben	13,582	12,257	16,259
..... P-Model	7608	7846	11,425
..... S-10	66,846	46,650	54,613
Truckline	2-'86	3-'86	4-'86
..... Blazer S	42,977	33,445	45,433
..... Astro	39,270	38,114	41,308
..... Van	27,386	24,165	38,056
Light Conventional	89,385	76,470	75,824
..... Sierra	--	1531	37,762
GMC . Jimmy	2263	2453	2431
.... Suburban	5989	7083	6191
..... P-Model	1135	1861	1729
..... S-15	16,646	12,759	14,609
..... Jimmy S	12,053	10,287	11,579
..... Safari	9632	9664	10,263
..... Van	8069	8360	12,560
Light Conventional	30,213	26,051	24,953
..... Sierra	--	610	12,776
Nissan. Pkup	23,135	20,228	21,569
AMC Grand Wagoneer	--	--	4363
.. Cherokee/ Wagoneer	--	--	39,296
.. Comanche	--	--	11,697